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4 March 1986

MEMORANDUM FOR: Deputy Director for Administration
Deputy Director for Intelligence
Deputy Director for Operations
Deputy Director for Science & Technology
Chairman, E Career Service

SUBJECT : Implementation of the New Secretarial Program

1. Attached is the memo that went to the DCI concerning the new Secretarial Program, together with my and Bob Magee's additional recommendations. Without the enthusiastic support of you and your people, we could never have gotten this far. Now the real work begins. I would like to share three or four specific points with you as we begin.

2. The conversion of secretarial positions to appropriate levels in the new system will begin immediately and will be a joint effort between you and PMCD. The approach designed by the Task Force allows you to designate any secretarial position at any level, provided that you follow the overall percentage rules and provided that the jobs actually do have the content that we expect them to have. PMCD's role in the process is to help your people make the modifications to individual positions necessary to bring them up to the levels you believe are required using the guidelines contained in our new Agency standard, as well as a set of Agency-wide rules which PMCD will need your help in finalizing. So as a general rule, if your managers are unhappy with a PMCD final call on whether or not a position qualifies for the desired level, it will be because your people haven't made the appropriate adjustments to job contents.

3. Second, just as critical to getting off on the right foot is the set of decisions which your panels will need to make to assign all existing secretaries and clericals to appropriate levels. The transition will doubtless be painful for a few whose expectations will not square with your panel's decisions. I merely note the obvious: our credibility in implementing this important aspect of the new system will be directly proportional to the honesty with which we deal with these issues. Two closing notes regarding this part of the process: as with the positions, PMCD will be working with you on the criteria for converting the people. Also, shorthand will be required for entry into Level IV per my forwarding memo to the DDCI and DCI.

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4. Third, I hope you share my view of the importance of the Secretarial Board in this new program. Your representative to the Board has an important role to play in monitoring the panel processes, advising you on suitable secretarial representation on the various panels, advising OTE on the content and scope of the various training programs underway, working to develop effective involvement of our secretaries in future clerical recruiting programs, and in other areas. I am aware that to the extent your secretary helps with the Board's effective functioning, her ability to serve you may be reduced. I hope you share my sense that the importance of the task justifies this slight inconvenience.

5. Finally, in doing away with the grade attraction principle, we have provided an opportunity for a new professionalism in our secretarial cadre. Our secretaries will have in this system for the first time an identity of their own, a more active and organized role in the general health of their profession, and a whole new set of rules to go by. It's a lot to absorb in one gulp--for both secretaries and managers. It's going to take a lot of encouragement from you, and a lot of foresight and wisdom on the part of the Secretarial Board, to make this program work to the advantage of both parties.

6. We all have a lot to learn about this new system, and I urge you to follow events closely as the whole thing unfolds. The specific steps in the implementation process will be discussed with you by OP personnel.

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Att: Secretarial Program pkg

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EK

ROUTING AND RECORD SHEET

SUBJECT: (Optional)

Experimental Pay and Job Evaluation Program for Secretaries

FROM:

Robert W. Magee
Director of Personnel

EXTENSION

NO.

D/Pers 86-0240

DATE

7 February 1986

TO: (Officer designation, room number, and building)

DATE

RECEIVED

FORWARDED

OFFICER'S
INITIALS

COMMENTS (Number each comment to show from whom to whom. Draw a line across column after each comment.)

1. Comptroller
7C36 Hqs.

2/10/86

2. DDA

1 FEB 1986

3. Executive Registry

13 FEB 1986

4. Executive Director

DT

5. DDCI

← DM

6. DCI

24 FEB 1986

7. EXDUR

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NO LATER THAN
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ADMINISTRATIVE - INTERNAL USE ONLY

Executive Registry

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13 February 1986

MEMORANDUM FOR: Director of Central Intelligence

THROUGH : Deputy Director of Central Intelligence

FROM : Executive Director

SUBJECT : Agency Secretarial Task Force Report

24 FEB 1986

1. Last May, I convened a Task Force to develop ideas for an improved approach to motivating and managing our secretarial/clerical work force. By early October, the group had finished its initial draft. Shortly thereafter, we commissioned an independent review of our proposal by Towers, Perrin, Forster and Crosby (TPF&C). The Task Force has recently reconvened, has come to consensus on the changes suggested by our outside consultants, and has adjusted its initial draft accordingly. The Director of Personnel has reviewed the entire proposal and in his memorandum, attached, recommends that we proceed.

2. The wider opportunity for secretarial advancement in the new system is based on the concept of job enrichment. It is the same notion which, in combination with the demise of the grade attraction principle, gives management the flexibility to establish secretarial positions at whatever level is required whenever it sees a need, so long as our overall limitations are not exceeded and providing the job content is there.

3. With regard to job content, PMCD is only now preparing its views on the measuring stick for the upper two pay levels of the new system, and these have not yet been vetted with Directorate management. I'm therefore skeptical of Bob Magee's statement (paragraph 7) that the "Projected Level IV secretarial jobs do not now exist." Certainly, we don't presently have a large number of them, but I find it hard to believe we have none. Because of the job enrichment factor, we have postulated a somewhat different role for PMCD in the system than it has traditionally had. PMCD's main job here is to help the Directorates establish positions where needed, and at the same time to ensure that the job content is there. While PMCD will be the final arbiter of whether or not a position qualifies for the level requested, the Agency-wide rules upon which such decisions are based must be developed using line management input. We all have a lot to learn about this new system.

4. I think the Task Force has done an excellent job. We have informed appropriate Congressional staffers of our plans to proceed. All of us recognize that adoption of this new system will require much hard work and that it likely will cause some short-term dislocation. We believe, however, that we have a real opportunity to make a genuine improvement in our ability to attract and retain a first-class secretarial work force, and to improve total Agency performance.

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ADMINISTRATIVE - EXTERNAL USE ONLY

5. With your approval of the basic concept, I will ask PMCD to begin the complex first task of determining, in partnership with the Directorates and with help from TPF&C, the appropriate levels in the new system for our current secretarial and clerical positions. We will also formally constitute an advisory Secretarial Board, which will have important responsibilities for monitoring the overall system's performance, and particularly for making recommendations on the training program which OTE must implement, and on how best to use today's secretaries to attract and recruit tomorrow's secretarial cadre.

6. The Task Force wrestled inconclusively with one of the more controversial issues having to do with the capabilities of our secretarial cadre, namely the shorthand requirement. There are as many views of the question of whether shorthand ought to be a requirement here as there are people. An informal survey done by us in August of the approximately 900 individuals who are Agency qualified in shorthand suggests that about one-third of them use it consistently. On the other hand, many of the Agency's senior secretaries seem to believe that shorthand capability is a necessary skill. We are presently in the unsatisfactory position of telling our employees that a shorthand capability isn't a formal requirement for promotion, when it is obvious that for a large number of jobs in the Agency it is a requirement for employment. Probably today's information technology will one day mature to the point that individuals will be able to dictate into a machine and get nearly finished copy. But that day seems some years away. My recommendation is that we support as an absolute requirement for promotion into Level IV the shorthand capability.

7. I think the "floater" concept noted at the bottom of page 2 and in the middle of page 9 of the Task Force Report, designed to handle surge requirements stemming from task force requirements and temporary dislocations due to training, reassignment, and the like, is a good one. I have reservations, however, about the numbers involved (up to 75 total) and am not sure how we would handle the concept administratively. The Task Force envisions these as Level III and IV secretaries serving on a rotational basis, and I am concerned about an expansion of this magnitude on the high end of the pay scale. Since this facet of the program can't be implemented until the secretarial pipeline is full in any event, I recommend that you approve it now only in concept, pending my review of the numbers involved and development of an acceptable administrative plan.

8. Finally, we need a schedule for implementation. Magee urges a 1 October deadline with the understanding that we would try to beat it, rather than be forced to rush through the complex process of converting positions and people, reprogramming the personnel and finance system software, setting up the appropriate panels, educating management, etc. While I share his concern that we proceed carefully, we can't lose sight of the fact that expectations are high regarding this program. Eight months' lead time seems overly cautious, and your management--myself included--want to get on with it. My recommendation is that we set a 1 July deadline. We can slip it if necessary.

Att

D/Pers 86-0240

COMPT -86-158

7 February 1986

MEMORANDUM FOR: Director of Central Intelligence

THROUGH: Deputy Director of Central Intelligence
Executive Director
Deputy Director for Administration
Comptroller

FROM: Robert W. Magee
Director of Personnel

SUBJECT: Experimental Pay and Job Evaluation Program for Secretaries

THE PROBLEM

1. Historically, one could ask any senior Agency manager to identify the two most pressing personnel issues and invariably the "secretary problem" would be one. Depending on individual circumstances, the "problem" would be defined as:

"there aren't enough"

or

"pay policy penalizes secretaries"

2. Reliable data supports both definitions:

--Secretarial vacancies plague each Directorate. The DI has ☐ vacancies, the DO ☐ DS&T ☐ and DA ☐ These gaps are caused by both the general increase in the work force and attrition out of secretarial ranks which occurs at a rate faster than can be replaced. If attrition were stemmed, concentrated recruitment efforts could alleviate, if not solve, the vacancy problem, but only at cost to other recruitment needs; e.g., analysts, case officers, engineers.

--The average secretary hits the normal secretarial grade ceiling (GS-7) within 18 months of entering on duty. The grim prospect for advancement is evident in the fact that there are ☐ GS-7 secretarial positions but only ☐ GS-8. The pyramid narrows even further: GS-9, ☐ GS-10, ☐ GS-11, ☐ As a consequence, most secretaries are forced into one

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SUBJECT: Experimental Pay and Job Evaluation Program for Secretaries

of three decisions, none in the Agency's interest: accept reality and remain an (increasingly unhappy) secretary; leave the secretarial track; or leave the Agency. Too many choose the latter two. Roughly 13% of secretaries leave the career annually either through resignation or reassignment. Seventy-five percent of the departees were at the GS-6/7 level.

3. A management dilemma adds to the problem. Under the current system, secretaries positions are largely determined by the grade of the supervisor rather than the substantive responsibilities of the job. This makes it difficult to assign skilled secretaries where they may really be needed because an adequately high position isn't available.

THE SOLUTION

4. Surveys and task force studies indicate a healthy, stable secretarial work force needs three things, in the given order of priority:

--DIGNITY. The secretary must be seen and treated as the vital office team member she is and allowed to develop her potential through training and enriched assignments. Managers must accept their responsibility to build and nurture a dignified secretary career track. This requires almost a cultural revolution among our managers.

--LONGEVITY. The secretary must see a professional track which will allow growth and job satisfaction for a full career.

--ECONOMIC SECURITY. The pay scale must be broad enough to allow financial growth commensurate with career growth.

5. From the Agency standpoint, a proper secretarial program allows for maximum MANAGEMENT FLEXIBILITY in assignments.

THE PROPOSAL

6. In May 1985, the Executive Director convened a task force to develop a comprehensive plan to improve the secretarial situation. No quick fixes were possible. What was needed was a new secretarial career pattern. A plan was developed and subsequently endorsed by the consulting firm of Towers, Perrin, Forster and Crosby. The highlights of the plan are:

--A new pay system outside the General Schedule. Four secretarial pay bands will be established at entry, journeyman, senior and executive assistant levels. These pay levels will depend solely on the responsibilities of the position, not the grade of the supervisor.

--Management responsibility for adding substantive enrichment elements to the various pay levels. Job enrichment is crucial to the plan.

--Required training to develop secretarial skills which are specifically linked to advancement within the occupation.

SUBJECT: Experimental Pay and Job Evaluation Program for Secretaries

--Expanded pay ranges within each band to allow for continued pay growth thereby making retention in the secretarial career more attractive.

--A performance award system with up to 30% of the Level II and III secretaries eligible for awards of \$1,000 and 30% of the Level IV secretaries eligible for awards of \$2,000 or \$3,000.

--Management flexibility to assign highly qualified secretaries to meet surge or crisis requirements.

COSTS

7. Establishment of a new career system is not without risks and costs. Specifically:

--Projected Level IV secretarial jobs do not now exist. If management is not seized of the issue and does not make a sustained effort to build enhanced positions, future downgrades from PMCD reviews are inevitable with resulting morale problems.

--Change is always traumatic. The program must be implemented slowly and with a thorough education program lest misunderstandings produce a morale crisis. This is particularly true during the conversion process from the old to new systems.

--Managers at all levels must be involved in the process. Without their understanding and commitment, the effort could fail. This will require an education program paralleling that for the secretaries themselves.

--First year implementation costs will be approximately [redacted] Costs for the second to fifth year are expected to exceed current General Schedule cost by approximately [redacted] per year. Beyond the fifth year, costs are expected to stabilize at about [redacted] over present GS costs. There will also be additional training costs of about [redacted] per year. The intent is that these costs will be offset by increased productivity from a better secretary work force and by reduction in recruitment costs which run about [redacted] per secretary hire.

RECOMMENDATION

8. The full proposal with revised pay levels is attached. This is a bold new initiative which we should try. We recommend you approve adoption of the new plan with a target implementation date of 1 October 1986.

[redacted]
Robert W. Magee

SUBJECT: Experimental Pay and Job Evaluation Program for Secretaries

CONCUR:

STAT

[Redacted Signature Box]

Comptroller

2/10/86
Date

STAT

[Redacted Signature Box]

Deputy Director for Administration

11 FEB 1986
Date

STAT

[Redacted Signature Box]

Executive Director

2/13/86
Date

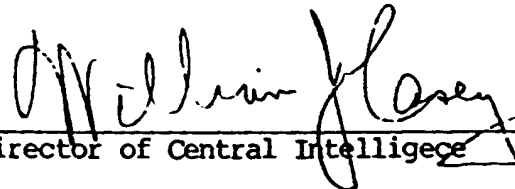
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[Redacted Signature Box]

Deputy Director of Central Intelligence

20 FEB 1986
Date

APPROVE:


Director of Central Intelligence

24 FEB 1986
Date

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**CENTRAL INTELLIGENCE AGENCY
EXPERIMENTAL PAY AND JOB EVALUATION PROGRAM
FOR THE SECRETARIAL OCCUPATION**

Report by

The Executive Director's Task Force
on the Secretarial Occupation

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Chairman and DA Representative

25X1

Secretarial Representative

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DS&T Representative

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DI Representative

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DO Representative

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DCI Representative

February 1986

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Secretarial Job Classification Criteria.....	Appendix B
Secretarial Pay Schedule.....	Appendix C
Secretarial Hiring Guidelines.....	Appendix D
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Secretarial Training Costs.....	Appendix F

PRECIS

The following plan for management of the secretarial occupation within the Agency has been developed by a task force of senior managers and secretaries convened by the Executive Director. The plan examines the history of secretarial management in the Agency, the problems associated with current practices, and offers a comprehensive new program designed to encourage bright and energetic employees to enter and remain within the secretarial occupation as a career. The major highlights of the plan are as follows:

- °Four new secretarial levels are defined. An entry level and a full-performance level will incorporate at least fifty percent of the typical secretarial duties currently found in Agency secretarial positions. A senior secretarial level and executive assistant level have been defined which include significant additional responsibilities to provide the challenge and job satisfaction to keep talented professional secretaries in the field for a career. These four levels, offering progressively more responsible job opportunities to secretaries as they advance through their careers, are based on individual position responsibilities rather than the responsibilities of the supervisor and replace the seven, more narrowly structured, General Schedule grades. These levels are the heart of the new system, and are predicated on the commitment of senior Agency management to build an attractive and progressively more responsible career path within the occupation. ☐ 25X1
- °The outline of a comprehensive career development program has been developed to provide a road map for participants in the program throughout their careers. The career development program allows individual secretaries to plan training and experience to meet specific career objectives. ☐ 25X1
- °A comprehensive training program has been outlined to complement the more demanding job responsibilities which will be incorporated into the occupation. This program, administered by the Office of Training and Education, reflects management commitment to build the employee skills required to make the program a success. Achievement of skills required in the occupation will be a major determinant for individual advancement within the occupation. ☐ 25X1
- °A new pay plan has been developed which is designed to reward exceptional performance and provide incentive to remain within the occupation over an extended career. The significant elements of that plan include:
 - Extended pay ranges to provide long-term salary growth potential within a pay level. These ranges are intended to reduce pressure on the system to promote employees as the primary means of granting pay increases. ☐ 25X1

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- Eligibility for annual within-level pay increases for fully-satisfactory performance, as opposed to waiting periods up to two and three years within the General Schedule as an employee attains seniority. This feature is designed to reward experience. ☐ 25X1
 - Eligibility for within-level increases every six months during the first two years of Agency employment for new employees in the entry and journeyman levels to reflect the rapid increase in value to the Agency during this period, and to remain competitive in the local marketplace. ☐ 25X1
 - New hiring guidelines which allow more flexibility to consider prior salary history and experience than is currently allowed to enable the Agency to better attract skilled and experienced secretaries. ☐ 25X1
 - A dedicated performance award program to encourage and reward excellence. This program allows up to 30 percent of the participants to receive performance awards each year. Those in the journeyman and senior levels will be eligible to receive awards of \$1000. Those in the executive assistant level will be eligible for awards of \$2000 or \$3000. ☐ 25X1
 - °Increased flexibility for management to establish secretarial positions and assign experienced people to meet urgent requirements. (U)
 - °Increased management flexibility to meet surge requirements resulting from crises and reduce underlaps created by reassignments, resignations, or training through the establishment of additional secretarial ceiling at Directorate level. ☐ 25X1

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I. BACKGROUND

One of the greatest challenges facing the Central Intelligence Agency is the unprecedented demand for collection, analysis, and reporting of intelligence on an ever-increasing number of complex issues facing our foreign-policy makers. At the same time, we are striving to make more efficient use of our resources to the greatest extent possible in order to meet the domestic challenge of reducing our national debt.

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To meet these competing objectives, we are focusing on our most valuable resource: our people. To assure optimal utilization of our human resources, we are examining our personnel management system, and refining it to make it more responsive to mission, while increasing our ability to attract and retain the high-caliber employees required to carry out our functions.

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One area of ongoing concern is the effectiveness of the General Schedule in attracting, retaining, and motivating employees with the skills, dedication, and drive that we demand. In an effort to examine alternatives to the General Schedule which might better enable us to meet the objective, we implemented an experimental pay-for-performance and job classification program in the Office of Communications (OC) on 10 January 1985. OC was selected as the first office for experimentation because of its large, homogeneous population of Telecommunications Officers who are unique to that office. This type of population was desired to minimize the variables we would have to monitor in evaluating the effectiveness of the system. This experimental program, which was modeled after a similar effort by the Department of the Navy at two of its West Coast laboratories, has been well received by participants and has been effective in meeting the program's stated objectives.

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In considering other occupations which might be suited to experimentation, we believe the next step is to consider a large occupation which is homogeneous throughout the Agency. This allows us to experiment with an alternative pay system which crosses Directorate lines, without getting into issues of occupational differences among the Directorates. The secretarial occupation is a logical selection for this purpose, as it is the only large occupation which has essentially the same responsibilities throughout the Agency. Furthermore, this occupation relates closely to other, more Directorate-specific clerical occupations, and may provide a core group to which we may later add additional occupations if the experiment proves successful.

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Experimentation with the secretarial occupation offers additional benefit to the Agency because of the concerns raised by managers and secretaries with regard to this career field. We see a continuing need for skilled and dedicated secretaries in the Agency. Department of Labor statistics portray the secretarial occupation as a career field for which demand will continue to increase nationally. Yet, Census Bureau projections indicate that the number

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of men and women entering the work force will decrease year by year through the end of the century and, with respect to this decreasing work force, it appears that more women are eschewing traditional female occupations such as secretary. The question arises: Will the Central Intelligence Agency continue to be able to compete for and attract the secretaries it needs? ☐ 25X1

We also reviewed some of the complaints which had been raised about the current system which classifies secretarial positions based primarily on the responsibilities of the supervisor, rather than on individual job responsibilities which are the basis for classification of all other Agency positions. This practice, referred to as the grade attraction principle, not only encourages secretaries to move from supervisor to supervisor seeking higher grades and discourages managers from building substance into secretarial positions, it also encourages secretarial attrition into other occupations and creates a management nightmare of continual recruiting, interviewing, hiring, and training of new secretaries. Managers maintain they need more flexibility to establish senior secretarial positions where the need for experience is greatest, without regard to the grade attraction principle. At the same time, several senior managers in our high-tech areas are concerned that their secretaries are being enticed away by private sector contractors because secretaries do not anticipate long-term career and pay potential if they remain in the secretarial field within the Agency. ☐ 25X1

The concerns raised by many of the secretaries mirror the concerns of the managers. Most secretaries come into the occupation, work hard and earn two promotions whereupon they reach a dead end, finding little career advancement to look forward to. As a result of limited career potential, they often feel that they are considered second-class citizens rather than full members of the office team, that they are not used to their fullest potential, and that, in essence, if they want to get ahead they should move out of the secretarial field. ☐ 25X1

To reverse these negative trends, the Executive Director convened a task force of senior Agency officers in May 1985 to develop a comprehensive approach to the management of the secretarial occupation which would address all the issues cited above. The task force, in conjunction with the consulting firm of Towers, Perrin, Forster and Crosby (TPF&C), has developed a comprehensive career development and pay program for this occupation. ☐ 25X1

Certain guiding principles directed the development of a new secretarial career system:

- a. Despite office automation the need for secretaries in the Agency is not likely to diminish.
- b. Agency officials need to have greater flexibility in managing their secretarial work force. ☐ 25X1

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c. Secretarial attrition must be kept at the lowest possible level.

- (1) From a security standpoint it is not desirable to have secretaries come into the Agency, be exposed to very sensitive information and then leave after a few years.
- (2) From a management standpoint, it is expensive and disruptive to continually recruit for new secretaries because of the long lead time required and the inevitable underlaps in clerical support.
- (3) We support secretaries leaving the field to advance in other career fields. There is great concern, however, about the loss of the experienced secretary who wants to remain in the career field but leaves because the occupation, as presently structured, does not provide career development and progression.

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With these guiding principles in mind, we set about to design a system which would be attractive to both managers and secretaries. We wanted to provide managers with greater hiring flexibility to attract secretaries with better entry-level skills as well as more experienced secretaries. We wanted to ensure that managers could monitor secretarial performance and have more control over secretarial advancement. We wanted to be sure that managers participated more in the development of senior secretarial and executive assistant positions, and that they had the latitude to place the positions where the need was greatest.

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Having reviewed the options available to us under the General Schedule (GS) pay system, we determined that the problem required nothing less than a total restructuring of the existing job classification methodology and compensation system. Our objective was not to maintain the occupational status quo while simply raising secretarial salaries. Rather, we set about designing a plan to enrich, enhance and expand the secretarial occupation so that, as a result of this job enrichment, better salary potential and career incentives could be provided.

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CONFIDENTIAL**II. THE PLAN**

The plan is divided into three components, the first being career enhancement. To support the enhancement of the secretarial positions, we have developed a comprehensive career development and job enrichment program. In this component of the plan a concerted effort will be made to identify those duties which should be performed by experienced secretaries. First, substantive duties and responsibilities which have been eroded from secretarial positions to develop other occupations such as the Administrative Assistant, will be folded back into the career field. Second, those more routine duties of officer positions which might be performed by secretaries also will be identified and folded into the occupation at the senior levels. This second source of secretarial position enhancement will enable officers to devote more time to primary, substantive responsibilities, and will serve to make the secretary in the office work as part of the team. Working from exemplar position descriptions developed for each Directorate and personnel career development profiles developed for the occupation, the manager will be able to take the actions necessary to develop the Level III and Level IV positions. We believe the career enhancement effort will be advantageous to both our clerical and officer occupations.

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In the second component of the plan, we have developed a job evaluation methodology which uncouples the grade level of the secretarial position from that of the supervisor, establishes position classification criteria to evaluate specific secretarial duties, and provides a means by which we may compare the secretarial occupation to other Agency occupations to ensure internal equity.

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The third component of the plan is a new pay system which encourages long-term retention in the occupation; rewards experience and excellence by emphasizing salary growth within levels rather than promotion between levels as the primary means of performance recognition; establishes stringent skill, experience, and training requirements for promotion; and which introduces an expanded performance recognition program to reward excellence within the occupation. There are a number of significant new elements in the plan. First, there are revised hiring guidelines which will recognize experience and prior salary more readily than our current system. Second, there is accelerated salary growth, during the first two years of Agency employment for secretaries in Levels I and II, to both recognize the rapid increase in value as Agency experience is developed and to achieve market competitiveness. Third, expanded salary ranges provide long-term salary growth potential within a pay level. These ranges are intended to reduce pressure on the system to promote employees as the primary means of granting pay increases. Fourth, the pay plan provides for annual within-level pay increases for fully-satisfactory

performance, as opposed to the waiting periods up to two and three years for within-grade-increases in the General Schedule. This feature is designed to reward experience. Finally, cash performance awards have been built into the plan to reward exceptional work and dedication. 25X1

Taken together these three components offer the Agency an opportunity to address the serious shortage of experienced clerical personnel in a meaningful and cost-effective manner. Without leaving the secretarial occupation, an employee entering on duty as a secretarial trainee can look forward to a career which offers progressively more responsible assignments coupled with commensurate salary growth. Career progression is accomplished through the use of a comprehensive career development program which encourages and rewards the attainment of additional experience and skill. 25X1

The remainder of this proposal describes the three individual components in greater detail. 25X1

III. CAREER ENHANCEMENT

A. Policy

The first component of the new secretarial career system is to enhance the occupation through job enrichment by restructuring the narrow job classification levels of the General Schedule into four broadly-defined levels of responsibility:

Level I	Secretarial Trainee
Level II	Secretary
Level III	Senior Secretary
Level IV	Executive Assistant

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Two key elements of career enhancement are to establish secretarial position levels based on the duties performed rather than the grade of the supervisor and to identify more substantive duties and responsibilities which will be added to secretarial positions. Some related support positions, which contain substantive secretarial duties and responsibilities, such as the Administrative Assistant, will be folded into the secretarial occupation where appropriate. In this way, the proliferation of secretary-like positions outside the secretarial field will be reversed, and an enhanced secretarial career path will be created.

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Working from model positions established within the Directorates, managers will have the flexibility to restructure some officer positions to eliminate some of the administrative and recurring aspects of these jobs. These duties may be used to develop Level III and Level IV secretarial positions, thereby increasing career opportunities of the secretaries. Position Management and Compensation Division (PMCD) will provide guidance to the Directorates as to the nature and level of responsibility for secretarial positions and will validate position levels once they have been established. Each Directorate, using allocated percentages and representative position descriptions, will develop and place secretarial positions based on its needs.

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In a mature system, we envision having as many as 20 percent of the secretaries at Level IV and distributing the remainder among the other three levels with approximately 30 percent at Level III. To allow the job enrichment program to proceed in a systematic fashion, the people and positions at Levels III and IV will be phased in over a four-year period. The people will be phased in as shown below:

<u>LEVEL</u>	<u>YEAR 1</u>	<u>YEAR 2</u>	<u>YEAR 3</u>	<u>YEAR 4</u>
IV	10%	13%	17%	20%
III	20%	25%	30%	30% (U)

Prior to implementation and during the first year of the new system, the Directorates and the DCI area (E Career Service) will work together with the private consultant and PMCD on a job enrichment program. The enrichment program will concentrate on allocating substantive job responsibilities which provide more challenge and opportunity for growth in the occupation. The projected number of secretarial positions at each level assumes a concerted effort on the part of Agency management to restructure and expand current secretarial positions to include additional substantive responsibilities in line with the level descriptors.

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The career development program, contained in Appendix A, describes the training, experience, and performance criteria for advancement within and between levels. Each level has a set of courses, variety of job experiences, and performance standards which must be met before the secretary is eligible for advancement to the next higher level. The program emphasizes development of office management, administrative, and technical support skills and focuses on the team building process between secretary and manager.

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In addition to the normal allocation of secretarial slots, we recommend that each Directorate be allocated an extra complement of up to 15 secretaries, five at Level IV and ten at Level III, for surge requirements and to provide secretarial coverage during training, home leave, reassignments or other underlaps.

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B. Implementation and Maintenance

The implementation of the new career system for secretaries must be done methodically to ensure consistency and equity across Directorates. Positions will be converted to one of the four secretarial levels. To convert positions, Directorate management will be provided with model positions developed by PMCD, and validated by TPF&C. Working from the model positions, Directorates will develop secretarial positions at Levels III and IV, and place them according to their requirements. Once functioning, these positions will be reviewed periodically by PMCD as part of its position management survey program. Future consideration will be given, on an occupation-by-occupation basis, to converting other related occupations to the new career system.

25X1

The employees will be phased into the program over the four-year period described above up to the percent goals set for each level. The number of secretaries may not exceed the number of the positions at each level. The position ceiling allocated to one Directorate may not be transferred to another.

25X1

Conversion of the people from the General Schedule to the new four level pay schedule will be the responsibility of special career panels in each Directorate and the DCI Area. The secretaries will be evaluated for conversion based on their experience and performance record. The details of the conversion process are outlined in Section V. ☐ 25X1

Once the system is operating, employees will be advanced within levels and promoted between levels through a formal career panel review process. The secretarial career panels will be responsible for determining a secretary's eligibility for advancement based on completion of the required training for that level, current performance, availability of promotion headroom, and meeting the following time-in-level guidelines:

Level I	2 years for promotion to Level II
Level II	3 years for promotion to Level III
Level III	5 years for promotion to Level IV <input type="checkbox"/>

25X1

To assure consistency and equity of the system throughout each Directorate and the Agency, several governors have been established. ☐ 25X1

First, secretarial career panels convened by individual Career Services will be responsible for monitoring training and experience requirements for secretarial advancement. Secretarial career panels will be established at the Office level for Levels I and II, and at the Directorate or E Career Service level for Levels III and IV, after initial implementation. The panels will be responsible for annually ranking all secretaries and recommending promotions and performance awards for eligible secretaries. Recommendations for promotion to Level II and performance awards at Level II are approved by the Head of the Career Subgroup. Recommendations for promotion to Level III will be submitted by the Office-level career panel to the Directorate-level career panel which will review the nominations of the various offices and develop a Directorate-level rank order of candidates which it will submit to the Deputy Director or Head of the E Career Service for approval. Directorate-level career panels also will review and rank Levels III and IV secretaries and make recommendations for promotion to the Deputy Director. Recommendations for performance awards for Level III and Level IV secretaries will be made by the Directorate-level career panels and approved by the Deputy Director or Head of the E Career Service. Panel members for Levels I, II, and III will include secretaries senior in rank to those being evaluated. Members of the Level IV evaluation panel will include senior officer representatives from each major component within the Directorate. ☐ 25X1

Each Career Service will ensure that advancements do not cause an excess of personnel in Levels III and IV in relation to the percentage and position constraints. Advancement will be based on a mixture of Agency-wide and Directorate-unique criteria (training, experience, skills, and performance). ☐ 25X1

Employees who do not continue to meet the qualification and performance standards in any of the levels will be subject to downgrading or other disciplinary measures in accordance with existing policy and regulation. 25X1

Second, an Executive Director's Secretarial Board will be established to assess and monitor the new system, provide periodic reports on the health of the occupation and recommend adjustments as necessary to the Director of Personnel. The Board also will be responsible for recommending additional training courses, participating in recruitment efforts, participating in the selection of new Agency office equipment, and acting as mentors for secretaries. The Board chairperson and initial members will be appointed by the Executive Director with nominations provided by each Deputy Director and the Head of the E Career Service. 25X1

Third, the Director of Personnel will monitor the compensation, position classification, performance awards, and advancement to determine the effectiveness of the system. PMCD will conduct an annual survey of a representative sample of secretarial positions to assure accuracy in the classification of positions. Any classification adjustments will be made in accordance with Agency position classification policy, and will be brought to the attention of the cognizant Deputy Director or Head of Independent Office. 25X1

Fourth, the Staff of the Inspector General (IG) will inspect and assess the secretarial program one year after its implementation, and every two years thereafter to assure equity and consistency in implementation and subsequent administration across Directorate lines. The IG will provide reports to the Director of Personnel and the Executive Director on his findings and will make recommendations as necessary. 25X1

CONFIDENTIAL**IV. JOB EVALUATION****A. Evaluation Methodology**

The second major component of the secretarial career system is the job evaluation methodology by which the enhanced duties and responsibilities of the four secretarial levels are defined and aligned with other Agency occupations on the General Schedule. The first step in this process was to develop generic job descriptions for each level. These job descriptions are designed to serve as the standard for the enrichment and enhancement of individual secretarial positions and are detailed in Appendix B.

25X1

The next step was to use these generic descriptions to link the newly designed positions to the General Schedule to ensure internal pay equity across Agency occupations. Based on the Agency's job classification system, the levels of responsibility of the newly defined secretarial levels can be identified and linked to the General Schedule.

25X1

B. Agency Job Evaluation Policy

The proposed evaluation program is consistent with Agency policy of establishing equal pay for equal work through a position classification program which compares the levels of knowledge and job responsibility of a position with that of related occupations. The Agency's position classification program, by policy, follows the guiding principles of the Classification Act of 1949 for jobs within the Federal Government. In keeping with Agency position management and classification policy, secretarial positions also will continue to be reviewed and classified against the attached level criteria as part of the regular position management survey program. While the intent of the secretarial program is to enhance the duties and responsibilities of the occupation and to allow Agency managers greater flexibility, the Director of Personnel, through the Chief, PMCD, retains the authority and responsibility for pay equity through the Agency's Position Classification Program.

25X1

CONFIDENTIAL**V. PAY PRACTICES****A. Policy**

The third component of the proposed secretarial system is aimed at enhancing and expanding the Agency's ability to attract and retain quality employees in the secretarial occupation, by experimenting with a modified pay-for-performance system. The plan will change the focus from promotion between pay levels as the primary means of rewarding excellence to movement within a pay level augmented by an enhanced cash performance award system. The pay system is established as follows:

1. In order to maintain the internal occupational alignment and establish the external pay linkage required to maintain and update our pay schedule, each pay level is linked at its midpoint to the midpoint of the corresponding General Schedule grade. Through PMCD evaluation, these linkages have been determined as Level I: GS-05; Level II: GS-07; Level III: GS-09; and Level IV: GS-10. 25X1
2. The salary range for each pay level is 50 percent from minimum to maximum, with each range divided into 20 equal increments. The value of an increment is computed as two percent of the salary range midpoint. This differs from the General Schedule, which has ranges of 30 percent from minimum to maximum, and 10 equal steps of approximately 3 percent of salary range midpoint. This new pay schedule is shown in Appendix C. 25X1
3. Employees are eligible for an annual within-level increase based on fully satisfactory performance as opposed to the General Schedule's waiting periods of one to three years for a within-grade increase to reward experience in the occupation. 25X1
4. Performance will be evaluated annually. A one step increase will be granted to those performing at the fully satisfactory or above level. A performance award pool will be established that allows up to 30 percent of the Level II secretaries and 30 percent of the Level III secretaries to receive awards of up to \$1000 annually. Additionally, up to 20 percent of the secretaries in Level IV may receive awards of up to \$2000, and up to 10 percent of the population of Level IV may receive performance awards of up to \$3000 annually. 25X1
5. New hires will be placed on the schedule in accordance with an assessment of relevant salary history and experience. The new hiring guidelines are shown in Appendix D. 25X1
6. During the first two years of Agency employment, secretaries in Levels I and II may receive pay adjustments of up to two increments per year to reflect their rapid increase in value as they obtain relevant Agency experience. 25X1

CONFIDENTIAL**B. Administrative Procedures**

Administrative procedures for the pay system are as follows:

1. The Career Panels for each Directorate and the DCI Area, (Chaired by an operating official and consisting of one other SIS officer and/or a GS-13 - GS-15 officer from the Directorate, two senior secretaries from the Directorate, and one SIS officer from another Directorate) will be responsible for initial conversion of employees to the new pay system. ☐ 25X1
2. The panels will determine, based on an individual personnel file review, the level to which a secretary is to be converted. This review will cover past and current performance, current level of responsibility, and current grade level and salary. ☐ 25X1
3. Placement on the new pay schedule will be to the salary which is nearest to, but not less than, the employee's current salary. ☐ 25X1
 - a. In those cases where it is not possible to match an employee's salary in the level for which qualified, the Career Panel may recommend to the cognizant Deputy Director that the employee be converted to the next higher level and be placed in an accelerated development program to meet the requisite qualifications for the level. ☐ 25X1
 - b. If the Career Panel believes that the employee's overall performance history would preclude development of the requisite qualifications, then the Deputy Director may recommend to the Director of Personnel that the employee be placed on the new schedule at the highest level for which qualified and be entitled to salary retention. Salary retention is authorized because placement was not caused by demotion for cause or at the employee's request. ☐ 25X1
4. Credit will be given for time completed toward a within-grade-increase and added to the General Schedule base salary at the time of conversion to establish the level on the new schedule. For example, an employee who has completed two years toward a three-year waiting period at the time of conversion will have the equivalent of two-thirds of a step added to the current General Schedule salary. The resulting salary rate will be used to determine placement on the new secretarial schedule. ☐ 25X1

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5. After conversion, employees with more than two years of Agency service in Levels I and II, and all employees in Levels III and IV, will be eligible for one incremental increase per year based on fully satisfactory performance. ☐ 25X1
6. Employees whose performance is not considered to be fully satisfactory will be denied incremental increases in accordance with Agency procedures for withholding General Schedule step increases. ☐ 25X1
7. New hires will be placed on the pay schedule in accordance with the new hiring guidelines. Decisions on new hire rates will be based on an evaluation of salary history and relevant experience. ☐ 25X1
8. New hires who are placed in Levels I and II of the pay schedule will be eligible for one increment increase every six months for the first two years of Agency employment if performance is evaluated at a fully satisfactory level. Current employees with less than two years at the time of conversion who are placed in Levels I or II will be eligible for one increment every six months until they have completed two years of Agency service. ☐ 25X1
9. Eligibility for performance awards will be determined by the appropriate Secretarial Career Panel based on performance during the current evaluation year. Each Directorate will develop criteria for performance awards which takes into account its unique requirements, and submit the criteria to the Executive Director's Secretarial Board for concurrence and the Director of Personnel for approval. On approval by the Director of Personnel, the evaluation criteria will be published and distributed to personnel within the Secretarial Program. ☐ 25X1
10. Annually, on receipt of the current year Agency operating budget, the Comptroller will certify the availability of funds for the performance award pool, or will, after obtaining Executive Director concurrence, notify the Directorates and DCI of additional constraints on the size of the pool which may be necessitated by budgetary limitations. ☐ 25X1
11. Employees within the Agency's three-year trial period will continue to be evaluated in accordance with that schedule. Thereafter, employees in the Secretarial Program will have their performance evaluated at least annually. Evaluations will be conducted using the newly established career development and training criteria and the current Agency performance appraisal system. Supervisors are responsible for communicating performance expectations to individual employees at the beginning of the evaluation year, and reaffirming that there is clear understanding of objectives periodically throughout the year as required by the Agency performance evaluation program. ☐ 25X1

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12. Annually, in accordance with the published performance evaluation schedule, secretaries will be evaluated and ranked by career panels at either the Office or Directorate level. ☐ 25X1
- a. Career panels at the Office level are responsible for evaluating Level I and Level II employees, and for recommending performance awards for Level II secretaries. Recommendations for promotion to Level II and performance awards at Level II are approved by the Head of the Career Subgroup. ☐ 25X1
- b. Recommendations for promotion to Level III will be submitted by the Office career panels to the Directorate-level career panels which will review nominations, prepare a composite Directorate-level ranking list and make final recommendations to the Deputy Director or Head of the E Career Service for approval. ☐ 25X1
- c. Directorate-level career panels will evaluate and rank Level III and Level IV secretaries, make recommendations for promotion to Level IV, and recommend performance awards for above average performers in Levels III and IV. Recommendations will be submitted to the Deputy Director or Head of the E Career Service for approval. ☐ 25X1
- d. Secretaries will be competitively ranked based on their overall performance record in accordance with Agency Uniform Promotion Guidelines. Those who meet all of the criteria for promotion may be advanced to the next level subject to overall percentage constraints which establish the number of authorized secretarial positions at each level for the Directorate or DCI Area. ☐ 25X1
- e. Time-in-grade guidelines to be used by evaluation panels in making promotion decisions are cited in Section III. ☐ 25X1
- f. Those selected for promotion will be advanced to the next level at a salary closest to, but not less than, the equivalent of two increments in the level from which the promotion is being made, or to the lowest increment of the new level, whichever is higher. ☐ 25X1
13. Comparability increases granted to the General Schedule will be granted to the Secretarial Program participants. At the time a comparability increase is awarded to the General Schedule, the Secretarial Pay Schedule will be adjusted at the midpoint, and the comparability increase distributed throughout each level. Employees will be automatically adjusted to the revised schedule. ☐ 25X1

CONFIDENTIAL**VI. OTHER CONSIDERATIONS FOR IMPLEMENTATION****A. Communication and Monitoring Process**

The success of the new career system for secretaries is contingent on a full understanding of the administrative procedures and incentive objectives defined therein. To achieve this, managers and secretaries will be fully briefed by representatives from the Office of Personnel on how the system will operate. Written personnel procedures, administrative guidelines, and regulation changes will be distributed by the Office of Personnel throughout the Agency, and particularly to Directorate and DCI Area Personnel Officers who will be technical referents responsible for the day-to-day administration of the system. []

The personnel and finance data bases will be programmed to accommodate the new salary schedule and to include procedures for movement through the system. The Office of Personnel, the Office of Training and Education, and the Office of Finance will also set up procedures to monitor the system with regard to recruitment guidelines, hiring and attrition rates, promotion rates, performance awards, and training schedules and costs. []

PMCD, in concert with the Executive Director's Secretarial Board, is responsible for overseeing the job enrichment of secretarial positions at each level within the ceiling constraints established for each level. []

B. Costs of the Program

Based on a ten year estimate of payroll and performance award operating costs, the first-year costs of implementing the secretarial program for our current population of approximately [] will be [] Costs for the second to fifth year are expected to exceed current General Schedule costs by approximately [] per year. Beyond the fifth year, costs are expected to stabilize at approximately [] per year over current General Schedule costs. It is important to note that these costs are based on an assumption that this program will be successful in reducing attrition by 50 percent. If attrition remains at current levels, the cost of the program will be less than projected because part of the higher costs are associated with the increased average salary which will result from increased seniority in the occupation. []

We anticipate that some of these associated costs, which will be absorbed in the existing payroll budget, may be offset by a decrease in secretarial recruitment costs as we reduce attrition from the occupation. The Agency's recruitment costs are approximately [] for each secretary who actually enters on duty. We are hiring approximately [] secretaries per year to replace those who have left the Agency, at a cost of over [] A 50 percent reduction in the attrition rate will decrease our recruiting costs by over []

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We believe that we will realize further offsets through an increase in productivity as the experience and skill level of the occupation is increased. Nearly 40 percent of our current secretarial population have less than 3 years of Agency experience, and only 30 percent have over 10 years of Agency experience. Over a period of time, we expect to significantly increase the time secretaries spend in the occupation and, consequently, their level of experience. With the increasing number of secretaries at the senior level who have ten and more years of Agency experience, not only will the productivity of the secretarial occupation be increased, but also of our officers will be able to delegate more to these experienced secretaries and may be able to devote greater time to higher-level substantive responsibilities. [REDACTED]

In addition to payroll, training costs for the secretarial career system will increase. The current clerical and secretarial training budget is projected to be [REDACTED] for FY87 and FY88. The training program required to support the secretarial career system will cost approximately [REDACTED] more per year than currently budgeted. This increase is necessary to accommodate the secretarial training requirements for certification at each of the four pay levels. [REDACTED]

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APPENDIX A

DEFINITION OF FOUR SECRETARIAL LEVELS

LEVEL I
SECRETARIAL TRAINEE

NATURE OF WORK: Work requires basic secretarial skills and knowledge of basic or commonly used rules, procedures, and office operations. Duties include routine typing, receptionist, correspondence control, and filing services for the office. The incumbent learns Agency-unique formats, the Agency record systems, and any word or data processing systems used in the office to which assigned. The incumbent is indoctrinated into the culture of an intelligence organization and learns the principles and practices of security and compartmentation. While the work at this level normally has little impact outside the immediate office, the incumbent is familiarized with the mission and functions of the office and how it fits into the larger organization.

TRAINING REQUIREMENTS: While in Level I, secretaries are expected, as a condition of advancement, to have completed the following required courses and, as availability permits, some of the recommended courses. Component career panels have responsibility for monitoring secretarial training against requirements and space availability.

Required Courses:

- Agency Orientation & Office Procedures
(classroom training, 3 days, full-time)
- Correspondence Techniques
(classroom, 3 days, to be developed)
- Grammar Review
(self-study, to be developed)
- Word Processing
(classroom training, 3 days, full-time or self-study)

Recommended Courses:

- Proofreading
(classroom, 4 days, part-time or self-study)
- Office Orientation
(classroom or videotape)
- VM or Computer training
(classroom, self-study, or test)

QUALIFICATIONS: To be placed in Level I, the secretary must pass the Agency Typing Test and the Standard Employment Test (SET), and must have a high school diploma or equivalent (e.g., GED).

Note: The overseas training requirements are not addressed in this draft.

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Advancement to Level II: Requires completion of required courses for Level I and normally two years of Agency secretarial experience. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Each Directorate and the E Career Service can specify the type and range of experience required.

An Office career service panel may evaluate and rank secretaries and forward advancement and performance award recommendations to the Head of the Career Subgroup for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Entrance on duty into Level II requires passing the Agency typing and SET tests and having five years of relevant experience in the private sector. At least two years of full-time (or part-time equivalent) related vocational and/or college course work can substitute for the experience criterion (see Agency Secretarial Hiring Guidelines, dated September 1985).

The following are examples of experience requirements to be obtained in Level I:

Must demonstrate basic understanding of the organization of the Agency and familiarization with names of key officials.

Must demonstrate an understanding of basic security requirements of working in an intelligence organization, for example:

- Proper use of black, red, and secure lines, and how to handle
- Familiarization with classification guidelines (the handbook, handling and mailing classified material, especially TS and SCI))
- Proper disposal of classified trash
- Opening, monitoring, and securing safes, vaults, typewriters, and other office equipment
- Monitoring visitors, including char-force, maintenance personnel, and foreign liaison personnel

STAT

Must demonstrate an understanding of basic compartmentation requirements of the Agency, for example:

- A general understanding of source and methods (need-to-know principle and what should not be discussed outside the office)
- Understanding of document and file control procedures
- Understanding of the principle against release of information to an unknown person, either on the telephone or in person

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Must demonstrate an understanding of Agency secretarial procedures, for example:

- Understanding of correspondence formats and dissemination procedures
- Understanding of office filing system
- Telephone message procedures
- Appointment calendar procedures

ADMINISTRATIVE - INTERNAL USE ONLY**LEVEL II**
SECRETARY

Nature of Work: Work requires knowledge of an extensive body of rules, procedures, and office operations. Work may require knowledge of the organization, mission, and key players of other offices. The secretary, in addition to Level I work, establishes and maintains filing and suspense systems; drafts routine and recurring statistical/information reports; arranges routine travel and meetings; maintains the supervisor's calendar; reviews outgoing correspondence for format and accuracy; relays information from the supervisor to his/her subordinates and helps set priorities by organizing the supervisor's mail, telephone calls, and visitors. The work of Level II requires an understanding of office responsibilities within the Directorate and usually a general knowledge of the discipline (e.g. Personnel, Geography, Area-specific Analysis, Security, Logistics, Operations). In this operational context, the secretary must be able to prioritize tasks, plan work, and handle interruptions without disruption to the overall functioning of the office. The secretary at Level II helps in the orientation and acculturation of new secretaries.

Training Requirements: To be eligible for advancement, must have completed the following required courses and 20 hours of recommended training while in Level II. Component career panels have the responsibility of monitoring secretarial training against requirements and space availability.

Required Course:

- Professional Office Protocol
(classroom, to be developed)
- Directorate Orientation
(classroom, 1-2 days, part-time)
- CIA Orientation Courses
(classroom, 3 days, full-time)
- Role of Secretary in Automated Office
(classroom, 1 day, full-time)
- Time Management
(classroom, 2 days, full-time)
- Stress Management
(classroom, 2 days, full-time)
- Essentials of Writing
(classroom, 5 days, full-time, to be developed)

Recommended Courses:

- Shorthand*
(classroom, 10 weeks, part-time; or self-study)

* Shorthand, although not a specific requirement for promotion, is still required in many secretarial positions. Therefore, to be competitive for these positions, secretaries should consider taking shorthand.

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Recommended courses, continued:

- Geography (component specific)
(classroom or self-study/videotape)
- Employee Development Course
(classroom, 3 days, full-time)
- Word Processing & Computer Training, as applicable
(classroom)
- Language Training, as applicable
(classroom, self-study, or test)
- Proofreading Course
(classroom, 4 days, part-time or self-study)

Advancement to Level III: Requires completion of the required training at Level II and normally three years' experience at Level II. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Each Directorate and the E Career Service can specify the type and range of experience required. For example, a combination of headquarters and field assignments, staff and line positions, and exposure to more than one component or unit may be required by a Directorate for advancement to Level III.

A Level II Secretary should have demonstrated an ability to manage the supervisor's appointments; to completely and efficiently coordinate messages, meetings, and office routines; to give guidance to more junior secretaries on formats, work management, and office techniques; and to accomplish most aspects of the job independently, asking for guidance only in unique or first-of-a-kind situations. The secretary at this level should have a good grasp of the bureaucratic structure and operations of the immediate office and how it relates to other components. Knowledge of major operations, key foreign political and liaison service figures, and the operating environment and stations supported by the component is an important factor in the quality of support the secretary is able to provide.

An Office career service panel will evaluate and rank secretaries and forward advancement and performance award recommendations to the Office Head. The Head of the Career Subgroup approves performance awards for Level II secretaries. Advancement recommendations will be forwarded to the Directorate-level career panel which will review the nominations from the various Offices and develop a rank order of candidates. The final candidate list will be submitted to the Deputy Director or Head of the E Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Entrance on duty into Level III requires a minimum seven years relevant experience in the private sector, three of which must have been in a senior executive secretarial-level position, and passing the Agency typing and SET tests. At least four years of full time (or part time equivalent) vocational or college course work in Secretarial Science or a related academic field and two years related experience may be substituted for the seven year experience requirement (see Agency Secretarial Hiring Guidelines, dated February 1986, Appendix D). Hiring into Level III requires approval of the Head of the Career Service.

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LEVEL III
SENIOR SECRETARY

Nature of Work: Work at Level III is significantly more complex than at Level II, because of the integration of work elements from within Agency components and requires a thorough working knowledge of the Agency's organizational structure, principal managers, practices, policies, and programs. Knowledge of other organizations also is frequently required, e.g., Department of State, foreign liaison services, Federal Bureau of Investigation, President's Foreign Intelligence Advisory Board, Intelligence Oversight Board, or other Intelligence Community agencies. The secretary's work at this level clearly impacts on other components, and contacts maintained in the other components are at a higher level than those of the Secretaries and Secretary Trainees. Secretaries in Level III usually have supervisory responsibility for other clerical staff members. Duties at Level III may include assembling background information for the supervisor; attending meetings and preparing a record of the proceedings; drafting regular and recurring statistical/information reports; arranging travel and conferences involving multiple participants and/or overseas itineraries; screening the supervisor's mail and assigning to other officers items which require preliminary work before being brought to the attention of the supervisor; initiating action on priority items when the supervisor is not available; and supervising and reviewing the work of subordinate secretaries and clerical employees, including having input to their Performance Appraisal Reports, as appropriate. The sensitivity of the work increases significantly at this level and may include restricted handling and bigoted operational cases, Top Secret and codeword material, sensitive personnel matters, financial accounting, and tightly held counterintelligence matters. Judgment and discretion are absolutely essential at Level III and above. Secretary may be required to apply writing skills in the drafting of memoranda, responses, and cables.

Training Requirements: To be eligible for advancement, secretaries must have completed the following required courses plus 120 hours of Level III training. Directorate-level career panels have the responsibility of certifying substitute course work using curriculum guidelines to be drawn up jointly by the Office of Personnel, the Executive Director's Secretarial Board, and the Office of Training.

Required Courses:

- Effective Oral Presentation
(classroom, 4 days, full-time)
- Getting Your Ideas Across
(classroom, 2 days, full-time)
- Supervisory Skills for Secretaries
(classroom, 5 days, full-time)
- Management Skills for Secretaries
(classroom, 3 days, full-time)

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Recommended Courses:

- Leadership Styles & Behavior
(classroom, 5 days, full-time)
- Advanced Writing Course
(classroom, 6 days, part-time)
- Management Development Course
(classroom, 5 days, full-time)
- Professional Woman's Course
(classroom, 5 days, full time)
- Psychological Self-Assessment (Looking Glass)
- Area Familiarization Courses
- Level II courses not yet taken

Advancement to Level IV: Requires five years Agency secretarial experience at Level III and successful completion of OTE training requirements. Time-in-grade guidelines may be waived by the Head of the Career Service for exceptional performance. Career services can specify the type and range of experience required. For example, a combination of headquarters and field assignments, staff and line positions, and exposure to more than one component or unit may be required by a Directorate for advancement to Level IV.

Advancement to Level IV is by Directorate or E Career Service nomination. The Directorate-level career service panel will evaluate and rank annually those eligible secretaries and forward nominations for advancement and for performance awards to the Deputy Director or Head of the E Career Service for approval within the Level IV position and personnel ceiling constraints. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

Level III candidates must have demonstrated a strong working knowledge of all Agency correspondence formats, the Agency records system, travel and accounting systems, Agency structure and functions, principal managers, and have engaged in increasingly more substantive tasking in the field. The Level III Secretary must understand the protocol, sources and methods, and political implications of internal and external contacts. Initiative, the ability to analyze situations and decide on a course of action, and interpersonal skills are critical.

Examples of required skills and successful performance include:

- Understanding of the organization, and its principal managers, practices, policies, and programs
- Knowledge of other organizations
(e.g., Department of State, FBI, domestic and foreign organizations)
- Demonstration of supervisory capability
- Understanding of statutes, policies & regulations
- Demonstration of strong organizing, office management, and expediting skills

ADMINISTRATIVE - INTERNAL USE ONLY**LEVEL IV**
EXECUTIVE ASSISTANT

Nature of Work: In addition to performing the duties of Level III, Executive Assistants function as an office expeditor in the coordination and integration of work flow from many different components and often from inter-agency working groups. The skills and knowledge required to perform effectively require a thorough understanding of the statutes, regulations, policy, and philosophy under which the Agency functions in the Intelligence Community. Work often requires regular contact with counterparts and officials in other Agencies to coordinate conferences, tasking deadlines, and liaison for the manager the secretary supports. The scope and effect of the manager's responsibilities impact on an Agency-wide or national level such that discretion and sophistication are required of the secretary in performing the work. Work requires a thorough working knowledge of the Agency, the manager's primary views and policies, and principal managers and secretaries in the Intelligence Community. The Level IV Secretary organizes and directs the day-to-day activities of the office, restructuring the work activities of subordinates to better accomplish program goals when necessary.

Secretaries performing Level IV work have the management skills and knowledge of the organization to be able to fulfill surge requirements throughout the Agency. Work at this level may require short- or long-term rotational assignments to meet crisis requirements when world events require an immediate Agency intelligence response or to support National Security Council tasking (e.g., secretarial support to the Arms Control Intelligence Staff). During these situations, the secretary expedites and oversees tasking deadlines of the office, coordinates with other components who must respond to cable traffic (e.g., personnel, security on travel arrangements of officials), and supervises the typing, record keeping, and tasking of subordinate secretaries, clerk typists, administrative assistants, or other support occupations. Assignments at this level may require secretarial coverage in offices where the principle secretary is in training, on leave, away on TDY, or is otherwise not available to perform the job. At times, the work may require TDY trips in advance of the manager's TDY travel or independent of the manager in support of Agency tasking requirements.

Training Requirements: While in Level IV, secretaries are eligible to take the Level IV courses listed below (some of the courses are by Directorate nomination). Directorate career panels have the responsibility for monitoring Executive Assistant training.

Recommended Courses:

- ° Mid-Career for Secretaries
(classroom, to be developed)
- ° Program on Creative Management
(classroom, 5 1/2 days, full-time)

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- **Management Skills for Secretaries**
(classroom, 3 days, full-time)
- **Management Development Course**
(classroom, 5 days, full-time)
- **Briefing Techniques Course**
(classroom, 5 days, full-time)
- **OTE Courses for GS-11 and above**
- **Level II & III courses not yet taken**
- **External seminars & symposiums**

Advancement

Directorate-level career service panels have the responsibility to rank and evaluate Executive Assistants annually. Career development recommendations and nominations for performance awards will be forwarded to the Deputy Director or Head of E the Career Service for approval. The Director of Personnel advises on advancement policy, approves advancement personnel actions, and ensures compliance with regulations.

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APPENDIX B

**THE FACTOR EVALUATION SYSTEM APPLIED
TO THE AGENCY'S SECRETARIAL OCCUPATION**

LEVEL I SECRETARIAL TRAINEE (full performance level)

Factor 1 Knowledge

Type II 350 points

Primary Std:

Knowledge of the standardized rules, procedures, or operations to perform full range of standard clerical assignments and resolve recurring problems. Some positions require skill in using computer terminals to input or retrieve data base items and/or to use as word processors.

GS-318 Std:

The work routinely involves specific duties such as typing, stenography, maintaining time and attendance cards, receiving visitors, filing, handling general office procedures, assembling information from several sources for technical reports, and keeping supervisor's calendar.

Knowledge stated above is applied to all the procedural work and functions of the immediate office. For example, work includes knowledge of:

Agency structure; specific knowledge of immediate office mission and how it relates to the component. Work at this level is comparable to the branch level within the Agency.

Agency correspondence formats and dissemination procedures.

Filing systems of office.

Fundamental security requirements: communication on secure/unsecure phones, handling classified material, monitoring visitors, securing safes, vaults, typewriter, word processing equipment.

Basic typing and office procedure skills.

**Factor 2 Supervisory Controls Level 2-2
125 points**

Primary Std:

The supervisor provides continuing or individual assignments, outlining procedures or steps to be taken, quality and quantity to be expected, deadlines and priority of assignments. Routine tasks are completed autonomously by employee; supervisor reviews for technical accuracy. Interim review by supervisor is provided for more involved, complicated assignments not previously performed by employee.

ADMINISTRATIVE - INTERNAL USE ONLY

GS-318

Secretary uses initiative in carrying out recurring work of the office independently, referring unusual problems and unfamiliar situations not covered by instructions to the supervisor. For example:

Receives and refers phone calls; personally answers routine questions concerning the functions of the immediate office in which assigned.

Proofreads correspondence for format and grammar accuracy; disseminates according to procedures provided. Refers questions to the next higher level secretarial review.

Maintain suspense dates on in/outgoing correspondence, notifying appropriate officers when deadlines approach. Type, prepare, and coordinate outgoing correspondence.

Factor 3 Guidelines Level 3-2 125 points

Primary Std:

Procedures for doing the work have been established and a number of specific guidelines are available. Employee uses judgment in locating and applying the appropriate guideline, reference, or procedure. Deviations from guidelines are referred to supervisor to handle.

GS-318:

Guidelines typically include dictionaries, correspondence style manuals, specific office instructions, handbooks for handling classified information. It is clear as to which guides are to be applied in most situations, although the secretary may decide which of the available alternatives to use.

Factor 4 Complexity Level 4-2 75 points

Primary Std:

The work includes duties that involve several related steps, processes, or methods. The decision regarding what needs to be done involves various choices and requires the employee to differentiate differences among easily recognizable situations (e.g., determining priorities, organization of work).

GS-318:

Secretaries at this level perform a full range of procedural duties in support of the office, including such duties as requisitioning supplies, printing, or maintenance service; filling out various travel forms for officers; arranging meeting rooms, and preparing standard reports. Work involves recognizing easily determined courses of action.

Factor 5 Scope and Effect Level 5-2 75 points

Primary Std:

The work involves the execution of specific rules, regulations, or procedures, and typically comprises a complete segment of an assignment or project of broader scope (e.g., beginning to end, sequential tasking). The work product affects the accuracy, reliability, or accountability of further processes or services.

ADMINISTRATIVE - INTERNAL USE ONLY**GS-318:**

Work affects liaison activities, work products of related offices (e.g., among divisions within a Directorate) or with subordinate offices (e.g., among branches within the division). Work at this level involves coordinating work and consolidating reports submitted by subordinate offices; and arranging meetings with participants outside the immediate or subordinate offices.

Factor 6 Personal Contacts Level 6-2 25 points

Primary Std:

The personal contacts are with employees within the same agency, but outside of the immediate office and/or with the general public. People contacted are engaged in different functions, missions, and kinds of work.

GS-318:

Personal contacts may be outside the immediate office involving same-level contacts in private industry or within the Agency (e.g., secretaries at Department of State, Defense Intelligence Agency, National Security Agency, or Agency contractors).

Factor 7 Purpose of Contacts Level 7-1 20 points

Primary Std:

The purpose of the contacts is to obtain, clarify or provide information regarding the immediate office's functions and usually relate directly to employee's duties and responsibilities. Although the purpose of contact may not be readily apparent, contact is recurring for purposes of obtaining or providing general information, coordinating office visits, informing caller that information has been mailed (in other words, of a routine nature).

GS-318

Secretary's interaction with others is to obtain or provide information such as informing others of office deadlines, recording time and attendance, seeking guidance on office procedures, and receiving visitors. Information provided is generally of an easily understood, nontechnical nature.

Factor 8 Physical Demands Level 8-1 5 points

Primary Std:

The work is sedentary. Generally, the work involves walking, standing, and sitting in a comfortable office atmosphere. Work may require lifting light items such as papers and small equipment parts and supplies. No special physical demands are required.

GS-318:

The secretarial work environment involves sedentary physical exertion as noted above.

Factor 9 Work Environment Level 9-1 5 points

Primary Std:

The work environment involves everyday risks and discomforts which require normal safety precautions typical of office settings. The work area is adequately lighted, heated, and ventilated.

ADMINISTRATIVE - INTERNAL USE ONLY

GS-318:

Secretary's work environment is usually in an office setting, conference rooms, library, or training rooms which are adequately lighted, heated, and ventilated.

TOTAL POINTS: 805

ADMINISTRATIVE - INTERNAL USE ONLY

LEVEL II SECRETARY (full performance level)

Factor I Knowledge Type III, Level 1-4 550 points

Primary Std:

Knowledge of an extensive body of rules, procedures, or operations requiring extended training and experience to perform a wide variety of interrelated or nonstandard procedural assignments and to resolve a wide range of problems. Knowledge is applied in a narrow way to perform technical work.

GS-318:

In addition to Level I knowledge, work at this level requires knowledge of duties, priorities, commitments, policies and program goals of the office and its suboffices to perform nonroutine assignments. The secretary is required to perform a wide variety of functions, any one of which may be the main responsibility of a Level I Secretary Trainee. At this level, the secretary is fully responsible for coordinating the work of the office with the work of other, related offices, and for recognizing the need for such coordination in various situations. This may include advising secretaries in subordinated offices of procedural changes, deadlines, and pertinent information. Secretary applies the knowledge of procedures, policies, and functions in summarizing information from files which may go into final reports and must recognize relevance of information to the problem at hand. For example, knowledge includes:

Organizational structure of the immediate office and how it relates to organization (e.g., structure of branch or division as it relates to the main office and Directorate).

Recognition of key Agency officials.

Extensive preparation of forms for travel, reimbursement, supplies, repair and maintenance, etc.

Supervisor's priorities so that secretary can sort mail, organize calendar, plan meetings in coordination with supervisor.

Factor 2 Supervisory Controls Level 2-3 275 points

Primary Std:

The supervisor makes assignments by defining objectives, priorities, and deadlines, assisting the employee in unusual or unprecedented situations. The employee plans and carries out the work to completion in accordance with instructions, policies, previous training, or accepted practices. Work is reviewed by supervisor for technical soundness, appropriateness, and conformity to policy and requirements.

GS-318:

The secretary plans and carries out the work of the office, handling problems that arise and deviations in office procedures in fulfillment of the

ADMINISTRATIVE - INTERNAL USE ONLY

office's functions. Often this requires networking with other, separate offices, to accomplish the work. Supervisor is available for general guidance when needed. Typical responsibilities include:

Screening telephone calls and visitors, handling those personally which do not require supervisor's help.

Keeps supervisor's calendar, schedules appointments and meetings without prior supervisor approval. Briefs supervisor on the nature of the meetings as well as nature of visitor requests.

Receives and disseminates requests for office information to the appropriate office for handling request. Prepares some replies personally.

Proofreads correspondence for format and grammar accuracy; disseminates according to procedures provided. Refers questions to the next higher level secretarial review.

Maintain suspense dates on in/outgoing correspondence, notifying appropriate officers when deadlines approach. Type, prepare, and coordinate outgoing correspondence.

Factor 3 Guidelines Level 3-3 275 points

Primary Std:

Guidelines are available, but are not completely applicable to the work or have gaps in specificity. Employee uses judgment in interpreting and adapting guidelines such as policy, regulations, and procedures to work product.

GS-318:

Secretary relies on judgment in applying guidelines and unwritten practices to situations which are not completely analogous.

Factor 4 Complexity Level 4-3 150 points

Primary Std:

The work includes various duties involving different and unrelated processes and methods. The decision regarding what needs to be done depends on discerning how each assignment fits into the priorities of the office and the course of action to be followed.

GS-328:

Decisions involving how the duties and assignments are to be completed are based on the secretary's thorough knowledge of the procedures, priorities, policies, and commitments of the office and often are not easily discernable. For example, the secretary:

Collates information from various sources and files to include in to monthly reports, identifying which information is relevant.

ADMINISTRATIVE - INTERNAL USE ONLY

Makes decisions in familiar or similar situations which are not routine nor based on set procedures.

Arranges travel and lodging based on knowledge of supervisor's commitments, preferences, and deadlines.

Arranges conferences, including preparing the correspondence, notifying participants, and coordinating time and accommodations.

Factor 5 Scope and Effect Level 5-2 75 points

Primary Std:

The work involves the execution of specific rules, regulations, or procedures, and typically comprises a complete segment of an assignment or project of broader scope (e.g., beginning to end, sequential tasking). The work product affects the accuracy, reliability, or accountability of further processes or services.

GS-318:

Work affects liaison activities, work products of related offices (e.g., among divisions within a Directorate) or with subordinate offices (e.g., among branches within the division). Work at this level involves coordinating work and consolidating reports submitted by subordinate offices; and arranging meetings with participants outside the immediate or subordinate offices.

Factor 6 Personal Contacts Level 6-2 25 points

Primary Std:

The personal contacts are with employees within the same agency, but outside of the immediate office and/or with the general public. People contacted are engaged in different functions, missions, and kinds of work.

GS-318:

Personal contacts may be outside the immediate office involving same-level contacts in private industry or within the Agency (e.g., secretaries at Department of State, Defense Intelligence Agency, National Security Agency, or Agency contractors).

Factor 7 Purpose of Contact Level 7-1 20 points

The purpose of the contacts is to obtain, clarify or provide information regarding the immediate office's functions and usually relate directly to employee's duties and responsibilities. Although the purpose of contact may not be readily apparent, contact is recurring for purposes of obtaining or providing general information, coordinating office visits, informing caller that information has been mailed (in other words, of a routine nature).

GS-318

Secretary's interaction with others is to obtain or provide information such as informing others of office deadlines, recording time and attendance, seeking guidance on office procedures, and receiving visitors. Information provided is generally of an easily understood, nontechnical nature.

ADMINISTRATIVE - INTERNAL USE ONLY

Factor 8 Physical Demands Level 8-1 5 points

Primary Std:

The work is sedentary. Generally, the work involves walking, standing, and sitting in a comfortable office atmosphere. Work may require lifting light items such as papers and small equipment parts and supplies. No special physical demands are required.

GS-318:

The secretarial work environment involves sedentary physical exertion as noted above.

Factor 9 Work Environment Level 9-1 5 points

Primary Std:

The work environment involves everyday risks and discomforts which require normal safety precautions typical of office settings. The work area is adequately lighted, heated, and ventilated.

GS-318:

Secretary's work environment is usually in an office setting, conference rooms, library, or training rooms which are adequately lighted, heated, and ventilated.

TOTAL POINTS: 1410

ADMINISTRATIVE - INTERNAL USE ONLY

LEVEL III SENIOR SECRETARY (full performance level)

Factor I Knowledge Type IV, Level 1-5 750 points

Primary Std:

Knowledge of basic principles, concepts, and methodology of an administrative occupation (in this case, secretarial), and skill in applying this knowledge in carrying out elementary assignments, operations, or procedures. The work involves use of a substantial specialized knowledge of the occupation's functions, practices, and procedures. The knowledge and skill sufficient to perform difficult searching duties, typically on the basis of verbal, correspondence, and telephone requests and for specific materials not located easily.

GS-318:

In addition to the knowledge, and skills required at lower levels, secretaries at this level must have as a continuing requirement:

A basic foundation of the administrative concepts, principles, regulations, and practices of the Agency to perform work independently in the resolution of nonroutine duties and responsibilities.

Ability to discern when changes to procedures to increase efficiency of operations are needed and then to be able to make necessary changes in the system for the coordination and integration of the work product.

Adoption of policies and procedures to unprecedented situations.

Knowledge of the supervisor's policies and views with regard to the office's missions and functions to enable the secretary to collate information for supervisor's use.

Application of the knowledge of the Agency's principal managers and structure.

Knowledge of the mission and structure of external organizations with which the office has regular contact.

Substantive coordination as an office expediter with direct tasking of subordinate officers of the supervisor to fulfill office requirements.

Knowledge of the techniques, protocols, and specialized systems associated with intelligence production in carrying out work functions.

Work may also require knowledge of supervisory procedures because many secretaries at this level direct and coordinate the work of secretaries in subordinate offices.

Factor 2 Supervisory Controls Level 2-4 450 points

Primary Std:

The supervisor sets the overall objectives and resources available. The employee and supervisor, in consultation, develop the deadlines, projects, and

ADMINISTRATION - INTERNAL USE ONLY

work to be done. At this level, the employee, having developed expertise in the occupation, is responsible for planning and carrying out the assignment, resolving most of the conflicts which arise; coordinating the work with others as necessary; and interpreting policy on own initiative in terms of established objectives. Completed work is reviewed only for overall effectiveness.

GS-318:

At this level, the secretary handles a wide variety of situations and conflicts requiring use of initiative to determine the approach to be taken or methods to use. This level is most likely to be found in offices of the size and scope that many office problems arise which cannot be brought to the attention of the supervisor. The secretary receives and reads incoming correspondence, screens items for personal handling or for dissemination to other subordinate officers for answering; follows up on deadlines of such requests; provides instructions on procedures, policy, regulations to subordinate secretaries; reviews their work for accuracy. For example:

The secretary notes commitments made by the supervisor during meetings, and informs the staff of those commitments.

When reviewing correspondence for the supervisor's signature, the secretary calls the writer's attention to any conflict reflected in the file or departure from policies and attempts to resolve conflict before matter is presented to supervisor.

The secretary drafts letters of acknowledgment, commendation, notification, etc.

The secretary insures all official social obligations are met, arranges proper protocol.

The secretary obtains information, the sources of which are not initially known and which may be available in only one or very few places. Subject matter is generally specialized and not a matter of widespread knowledge or is complicated because it is scattered in numerous documents or only in "institutional memory". The secretary organizes the material, outline important issues.

Using personal initiative, the secretary observes the need for administrative or procedural notices or instructions to the staff, prepares necessary issuances and presents them for signature. The employee devises and installs office procedures.

Factor 3 Guidelines Level 3-3 275 points

Primary Std:

Guidelines are available, but are not completely applicable to the work or have gaps in specificity. Employee uses judgment in interpreting and adapting guidelines such as policy, regulations, and procedures to work product.

ADMINISTRATIVE - INTERNAL USE ONLY

GS-318:

Secretary relies on judgment in applying guidelines and unwritten practices to situations which are not completely analogous.

Factor 4 Complexity Level 4-3 150 points

Primary Std:

The work includes various duties involving different and unrelated processes and methods. The decision regarding what needs to be done depends on discerning how each assignment fits into the priorities of the office and the course of action to be followed.

GS-328:

Decisions involving how the duties and assignments are to be completed are based on the secretary's thorough knowledge of the procedures, priorities, policies, and commitments of the office and often are not easily discernable. For example, the secretary:

Collates information from various sources and files to include in to monthly reports, identifying which information is relevant.

Makes decisions in familiar or similar situations which are not routine nor based on set procedures.

Arranges travel and lodging based on knowledge of supervisor's commitments, preferences, and deadlines.

Arranges conferences, including preparing the communication vehicle, notifying participants, and coordinating time and accommodations.

Factor 5 Scope and Effect Level 5-3 150 points

Primary Std:

Work involves treating a variety of conventional problems, questions or situations in conformance with established criteria. The work product or service affects the design or operation of programs in the immediate or related offices.

GS-318:

Secretaries service offices that clearly and directly affect a wide range of Agency activities, operations in other agencies, or a large segment of the public. The secretary at this level modifies and devises methods and procedures that significantly affect the function and mission of the office. The secretary identifies and resolves various problems and situations that affect the orderly and efficient flow of work in transactions with others outside the immediate office and/or Agency.

Factor 6 Personal Contacts Level 6-3 60 points

Primary Std:

The personal contacts are with individuals of groups outside the Agency in a moderately unstructured setting (contacts are not established on a routine

ADMINISTRATIVE - INTERNAL USE ONLY

basis; the purpose and extent of each contact is different). Typical contacts are with attorneys, contractors, representatives of professional organizations, etc.

GS-318:

Secretary is required to identify and locate the appropriate person to contact or to apply significant skill and knowledge in determining to whom a telephone call or visitor should be directed; the purpose and extent of each contact is different, and the role and authority of each party is identified and developed during the course of the contact.

Factor 7 Purpose of Contacts Level 7-2 50 points

Primary Std:

The purpose of the contacts is to plan, coordinate, or advise on work efforts or to resolve operating problems by influencing or motivating individuals or groups who are working toward mutual goals and who basically have cooperative attitudes.

GS-318:

Typical duties normally include insuring that reports and responses to correspondence are submitted in a timely manner, making travel arrangements, scheduling conferences, being an information vehicle for subordinate offices.

Factor 8 Physical Demands Level 8-1 5 points

Primary Std:

The work is sedentary. Generally, the work involves walking, standing, and sitting in a comfortable office atmosphere. Work may require lifting light items such as papers and small equipment parts and supplies. No special physical demands are required.

GS-318:

The secretarial work environment involves sedentary physical exertion as noted above.

Factor 9 Work Environment Level 9-1 5 points

Primary Std:

The work environment involves everyday risks and discomforts which require normal safety precautions typical of office settings. The work area is adequately lighted, heated, and ventilated.

GS-318:

Secretary's work environment is usually in an office setting, conference rooms, library, or training rooms which are adequately lighted, heated, and ventilated.

TOTAL POINTS: 1895

ADMINISTRATIVE - INTERNAL USE ONLY

LEVEL IV EXECUTIVE ASSISTANT (full performance level)

Factor 1 Knowledge Type IV, Level 1-5 750 points

Primary Std:

Knowledge of basic principles, concepts, and methodology of an administrative occupation (in this case, secretarial), and skill in applying this knowledge in carrying out elementary assignments, operations, or procedures.

GS-318:

In addition to the knowledge, and skills required at lower levels, Executive Assistants at this level must have as a continuing requirement:

A basic foundation of the administrative concepts, principles, regulations, and practices of the Agency to perform work independently in the resolution of nonroutine duties and responsibilities.

Ability to discern when changes to procedures to increase efficiency of operations are needed and then to be able to make necessary changes in the system for the coordination and integration of the work product.

Adoption of policies and procedures to unprecedented situations.

Knowledge of the supervisor's policies and views with regard to the office's missions and functions to enable the Executive Assistant to collate information for supervisor's use.

Application of the knowledge of the Agency's principal managers and structure.

Knowledge of the mission and structure of external organizations with which the office has regular contact.

Substantive coordination as an office expediter with direct tasking of subordinate officers of the supervisor to fulfill office requirements.

Knowledge of the techniques, protocols, and specialized systems associated with intelligence production in carrying out work functions.

Work may also require knowledge of supervisory procedures because many Executive Assistants at this level direct and coordinate the work of secretaries and other clericals in subordinate offices.

Factor 2 Supervisory Controls Level 2-4 450 points

Primary Std:

The supervisor sets the overall objectives and resources available. The employee and supervisor, in consultation, develop the deadlines, projects, and work to be done. At this level, the employee, having developed expertise in the occupation, is responsible for planning and carrying out the assignment,

ADMINISTRATIVE - INTERNAL USE ONLY

resolving most of the conflicts which arise; coordinating the work with others as necessary; and interpreting policy on own initiative in terms of established objectives. Completed work is reviewed only for overall effectiveness.

GS-318:

At this level, the Executive Assistant handles a wide variety of situations and conflicts requiring use of initiative to determine the approach to be taken or methods to use. This level is most likely to be found in offices of the size and scope that many complex office problems arise which cannot be brought to the attention of the supervisor.

For example:

The Executive Assistant notes commitments made by the supervisor during meetings, and informs the staff of those commitments.

When reviewing correspondence for the supervisor's signature, the Executive Assistant calls the writer's attention to any conflict reflected in the file or departure from policies and attempts to resolve conflict before matter is presented to supervisor.

The Executive Assistant drafts letters of acknowledgment, commendation, notification, etc.

The Executive Assistant insures all official social obligations are met, arranges proper protocol.

The Executive Assistant obtains information, the sources of which are not initially known and which may be available in only one or very few places. Subject matter is generally specialized and not a matter of widespread knowledge or is complicated because it is scattered in numerous documents or only in "institutional memory". The Executive Assistant organizes the material, outline important issues.

Using personal initiative, the Executive Assistant observes the need for administrative or procedural notices or instructions to the staff, prepares necessary issuances and presents them for signature. The employee devises and installs office procedures.

Factor 3 Guidelines Level 3-3 275 points

Primary Std:

Guidelines are available, but are not completely applicable to the work or have gaps in specificity. Employee uses judgment in interpreting and adapting guidelines such as policy, regulations, and procedures to work product.

GS-318:

Executive Assistant relies on judgment in applying guidelines and unwritten practices to situations which are not completely analogous.

ADMINISTRATIVE - INTERNAL USE ONLY

Factor 4 Complexity Level 4-4 225 points

Primary Std:

The work typically includes varied duties requiring many different and unrelated processes and methods such as those relating to well-established aspects of an administrative or professional field. Decisions concerning work include assessment of unusual circumstances, variations in approach, and incomplete or conflicting data.

GS-318:

The Executive Assistant must interpret the data, plan the work, refine the methods and techniques, if necessary to accomplish work product and services. The Executive Assistant must apply management skills and knowledge of the Agency to fulfill the missions of the diversified office, often expediting tasking against time pressure deadlines and coordinating responses with officers in other offices.

Factor 5 Scope and Effect Level 5-4 225 points

Primary Std:

The work product or service affects the completeness, accuracy, quality, and timeliness of Agency programs. The work involves investigating or analyzing and resolving a variety of unusual conditions, problems, or questions in the profession; contributing to identification of problems and changes to applicable standards and rules in work situations.

GS-318:

Executive Assistants service offices that clearly and directly affect a wide range of Agency activities, operations in other agencies, or a large segment of the public. The Executive Assistant at this level modifies and devises methods and procedures that significantly affect the function and mission of the office. The Executive Assistant identifies and resolves various problems and situations that affect the orderly and efficient flow of work in transactions with others outside the immediate office and/or Agency.

Factor 6 Personal Contacts Level 6-4 110 points

Primary Std/GS-318:

The personal contacts are with high-ranking officials from outside the Agency in highly unstructured settings (e.g., contacts are characterized by problems such as: the officials may be relatively inaccessible; arrangements may have to be made well in advance; each party may be very unclear as to the role and authority of the other). Typical contacts might be members of Congressional Staffs, foreign representatives, international or national presidents or vice-presidents, Department of Defense, State, Federal Bureau of Investigation officials, etc.

Factor 7 Purpose of Contacts Level 7-2 50 points

Primary Std:

The purpose of the contacts is to plan, coordinate, or advise on work efforts or to resolve operating problems by influencing or motivating individuals or groups who are working toward mutual goals and who basically have cooperative attitudes.

ADMINISTRATIVE - INTERNAL USE ONLY

GS-318:

Typical duties normally include insuring that reports and responses to correspondence are submitted in a timely manner, making travel arrangements, scheduling conferences, being an information vehicle for subordinate offices.

Factor 8 Physical Demands Level 8-1 5 points

Primary Std:

The work is sedentary. Generally, the work involves walking, standing, and sitting in a comfortable office atmosphere. Work may require lifting light items such as papers and small equipment parts and supplies. No special physical demands are required.

GS-318:

The Executive Assistant's work environment involves sedentary physical exertion as noted above.

Factor 9 Work Environment Level 9-1 5 points

Primary Std:

The work environment involves everyday risks and discomforts which require normal safety precautions typical of office settings. The work area is adequately lighted, heated, and ventilated.

GS-318:

Executive Assistant's work environment is usually in an office setting, conference rooms, library, or training rooms which are adequately lighted, heated, and ventilated.

TOTAL POINTS: 2095

APPENDIX C

Secretarial Pay Plan

GRADE	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	Incre
I	13240	13588	13936	14284	14632	14980	15328	15676	16024	16372	16720	17068	17416	17764	18112	18460	18808	19156	19504	19852	346
II	16398	16829	17260	17691	18122	18553	18984	19415	19846	20277	20708	21139	21570	22001	22432	22863	23294	23725	24156	24587	431
III	20061	20589	21117	21645	22173	22701	23229	23757	24285	24813	25341	25869	26397	26925	27453	27981	28509	29037	29565	30093	526
IV	22089	22670	23251	23832	24413	24994	25575	26156	26737	27318	27899	28480	29061	29642	30223	30804	31385	31966	32547	33128	581

GENERAL SCHEDULE OF ANNUAL SALARY RATES BY GRADE
(Effective First Pay Period On or After 6 January 1985)
(Executive Order 12496)

(Effective 09/01/2016)											
Rates within grade and moving period for next step increase											
Grade	57 weeks					156 weeks					Step Increase
	1	2	3	4	5	6	7	8	9	10	
GS-1	8,339	8,850	9,361	9,872	10,383	10,894	11,405	11,916	12,427	12,938	13,449
GS-2	10,501	10,750	11,000	11,250	11,500	11,750	12,000	12,250	12,500	12,750	13,000
GS-3	11,458	11,840	12,222	12,604	12,986	13,368	13,750	14,132	14,514	14,896	15,278
GS-4	12,867	13,291	13,715	14,139	14,563	14,987	15,411	15,835	16,259	16,683	17,107
GS-5	14,390	14,870	15,350	15,830	16,310	16,790	17,270	17,750	18,230	18,710	19,190
GS-6	16,000	16,575	17,150	17,725	18,300	18,875	19,450	20,025	20,600	21,175	21,750
GS-7	17,874	18,418	18,962	19,506	20,050	20,594	21,138	21,682	22,226	22,770	23,314
GS-8	18,740	19,384	20,028	20,672	21,316	21,960	22,604	23,248	23,892	24,536	25,180
GS-9	21,804	22,531	23,258	23,985	24,712	25,439	26,166	26,893	27,620	28,347	29,074
GS-10	24,071	24,811	25,551	26,291	27,031	27,771	28,511	29,251	30,000	30,740	31,480
GS-11	26,381	27,240	28,099	28,958	29,817	30,676	31,535	32,394	33,253	34,112	34,971
GS-12	31,619	32,673	33,727	34,781	35,835	36,889	37,943	38,997	40,051	41,105	42,159

ADMINISTRATIVE - INTERNAL USE ONLY

APPENDIX D

AGENCY SECRETARIAL HIRING GUIDELINES

**GENERAL SCHEDULE
CURRENT POLICY**

**LEVEL I
SECRETARIAL TRAINEE**

<u>GS</u>	<u>SALARY</u>	<u>STEP</u>	<u>SALARY</u>	<u>SKILL & EXPERIENCE</u>
4/1	12,862	1	13,240	No EXP/AQT/SET
No current hiring equivalent		2	13,588	No EXP/AQT/SET/AQS
5/1	14,390	7	15,328	1 yr related vocational or college/AQT/SET
5/1	14,390	7	15,328	1 yr EXP/AQT/SET
5/3	15,350	8	15,676	1 yr EXP/AQT/SET/AQS
5/3	15,350	9	16,024	1 1/2 to 2 yrs EXP/AQT/SET
No current hiring equivalent		10	16,372	1 1/2 to 2 yrs EXP/AQT/SET/AQS
5/3-5/4	15,350 - 15,830	11	16,720	2 to 3 yrs EXP/AQT/SET
No current hiring equivalent		12	17,068	2 to 3 yrs EXP/AQT/SET/AQS
5/4-5/5	15,830 - 16,310	12	17,068	3 to 4 yrs EXP/AQT/SET
No current hiring equivalent		13	17,416	3 to 4 yrs EXP/AQT/SET/AQS

KEY: AQT = Has Agency Qualified Typing Skill
AQS = Has Agency Qualified Shorthand Skill
SET = Has passed the Standard Employment Test
EXP = Indicates years of relevant experience

ADMINISTRATIVE - INTERNAL USE ONLY

AGENCY SECRETARIAL HIRING GUIDELINES

GENERAL SCHEDULE
CURRENT POLICY

LEVEL II
SECRETARY

<u>GS</u>	<u>SALARY</u>	<u>STEP</u>	<u>SALARY</u>	<u>SKILL & EXPERIENCE</u>
No current hiring equivalent		1	16,398	2 yrs related vocational or college/AQT/SET
6/3	17,110	2	16,829	2 yrs related vocational or college/AQT/SET/AQS
5/5	16,310	6	18,553	5 yrs EXP/AQT/SET
6/5	18,180	7	18,984	5 yrs steno & sec EXP/AQT/SET/AQS

GENERAL SCHEDULE
CURRENT POLICY

LEVEL III
SENIOR SECRETARY

<u>GS</u>	<u>SALARY</u>	<u>STEP</u>	<u>SALARY</u>	<u>SKILL & EXPERIENCE</u>
No current hiring equivalent		1	20,061	4 yrs related vocational training/college or 4 yrs nonrelated college plus 2 yrs of secretarial experience/AQT/SET/SET
No current hiring equivalent		2	20,589	4 yrs related vocational training/college or 4 yrs nonrelated college plus 2 yrs of secretarial experience/AQT/SET/AQS
No current hiring equivalent		5	22,173	7 to 10 yrs EXP (3 yrs as Exec Secretary)/AQT/SET OR match <u>base</u> salary plus 10%

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Cost assumptions for the secretarial pay schedule are based upon the following assumptions:

- a) A one time conversion cost from the General Schedule to the new pay schedule.
- b) Annual performance awards of:
 - \$1,000 for 30% of Level II
 - \$1,000 for 30% of Level III
 - \$2,000 for 20% of Level IV
 - \$3,000 for 10% of Level IV
- c) Advancement within levels
 - 1 incremental increase every six months granted employees in their first two years of service.
 - 1 incremental increase every year to employees with more than two years of service.
- d) Advancement between levels equal to 2 increments or to the minimum step of the next level based on headroom at the next level and the following time-in-level guidelines:

Level I	2 years
Level II	3 years
Level III	5 years
- e) Most secretaries will enter on duty in Level I, step 7 (\$15,328).
- f) Attrition rates are figured in at one half the historical rate for each level:

Level I	6%
Level II	7%
Level III	11%
Level IV	9%

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TOWERS, PERRIN, FORSTER & CROSBY

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WILLIAM A. JAFFE
Vice President

February 10, 1986

CONFIDENTIAL

STAT

[REDACTED]
Position Management Officer
Central Intelligence Agency
Washington, DC 20505

Dear Carol:

The purpose of this letter is to provide TPF&C's comments regarding the Agency's proposed Experimental Pay and Job Evaluation Program for Secretaries. The comments are based upon our review of the January 27, 1986 draft of the proposed Program. We understand that while there have been some minor editorial changes made to the document, no substantive changes have been made in the Program content.

TPF&C reviewed the proposed Program based upon four criteria:

- effective compensation principles,
- stated Agency Program objectives,
- private sector practices and research, and
- selected other factors such as cost, pressure to experiment with other pay approaches and impact on turnover.

Our analysis of the Program indicates that it is conceptually sound in design with respect to compensation principles. The Program structure incorporates a means to assess internal equity and to maintain external competitiveness (consistent with Federal government pay practices). It also includes administrative procedures to adjust individual salaries, to adjust the pay schedule, and to select secretaries who are to receive performance bonus awards. The Program also proposes a significant investment in secretarial training and the redefinition of the secretarial role. These planned procedures are consistent with the Agency's stated objectives.

TOWERS, PERREN, FORSTER & CROSBY

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LETTER TO

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February 10, 1986

The proposed plan provides the Agency with flexibility in setting new hire rates and with the ability to group secretaries into four levels. These are common private sector practices.

The Agency will need to determine whether the cost of implementing the Program is within acceptable parameters and if the Plan will achieve the Agency recruitment and turnover objectives without adverse consequences (e.g., increased turnover in other occupations).

In conclusion, TPF&C believes that the Program is conceptually sound and has the potential to contribute to the achievement of those objectives stated in the document.

Sincerely,



William A. Jaffe

WAJ:md

cc:

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3 February 1986

Establishment of Secretarial Board

Charge:

- provide periodic assessment of new system re effectiveness of attracting, developing, motivating and retaining secretarial/clerical work force
- recommend adjustments to management
- build close partnership with secretaries, panels and managers to make system work well

Goals:

- assist OTE in development of training curriculum to support new system
 - identify priority courses - what's essential; what isn't
 - establish orderly progression
 - identify what's mobile (i.e., can be taken overseas)
 - establish implementation guidelines -- concentrate on EOD's; work in others
 - participate as desirable in training programs
 - develop effective ways to explain to components and component panels importance of training program
- participate in recruitment process
 - make suggestions as to how we can better find the kinds of people who will fit our new program and who will want to stay in it
 - encourage and coordinate secretarial participation in recruitment exercises
 - establish guidelines for followup monitoring of new EOD's (through first year)
- devise facility for monitoring retention capability of new system and to allow for exchange of innovative ideas
 - make board "visible" - publicize existence
 - create mentoring system throughout secretarial/clerical workforce (but do not confuse with "grievance" system, for which channels are already established)
 - develop network for receiving feedback on health/welfare of system
 - create forums for exchange of ideas/information among the board, managers and secretaries
- broker certain rotational assignments in coordination with directorate management
 - training instructors
 - recruiters
 - floaters
- otherwise establish Board as management support entity

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